Content Authors: Updating an Asset File in Documentum WebPublisher
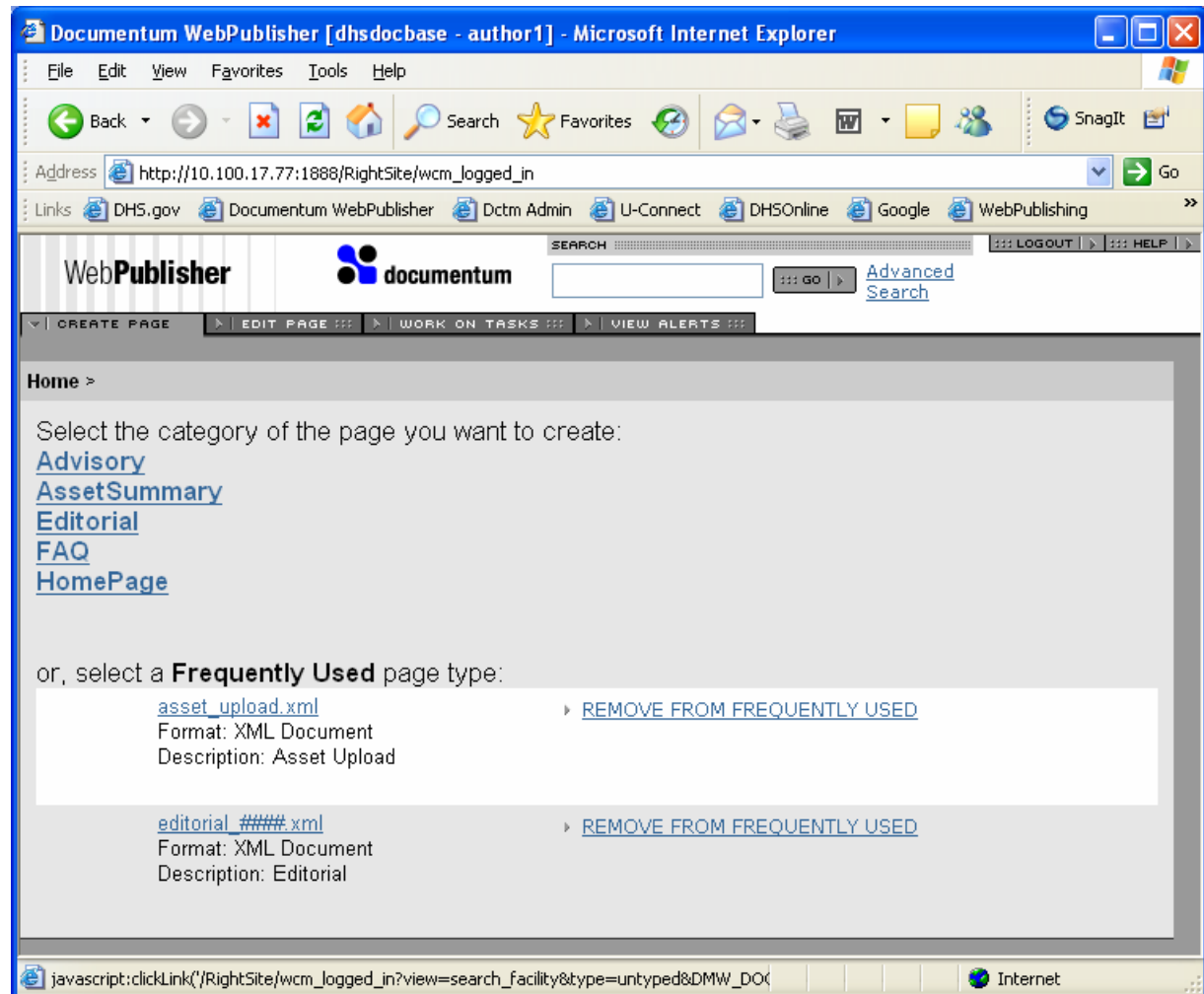
1. Click on "Advanced Search

2. Type the name of the file into the "File name" box. You do not have to type the entire file name, (e.g., OSDBU will return all files with OSDBU in the file name).
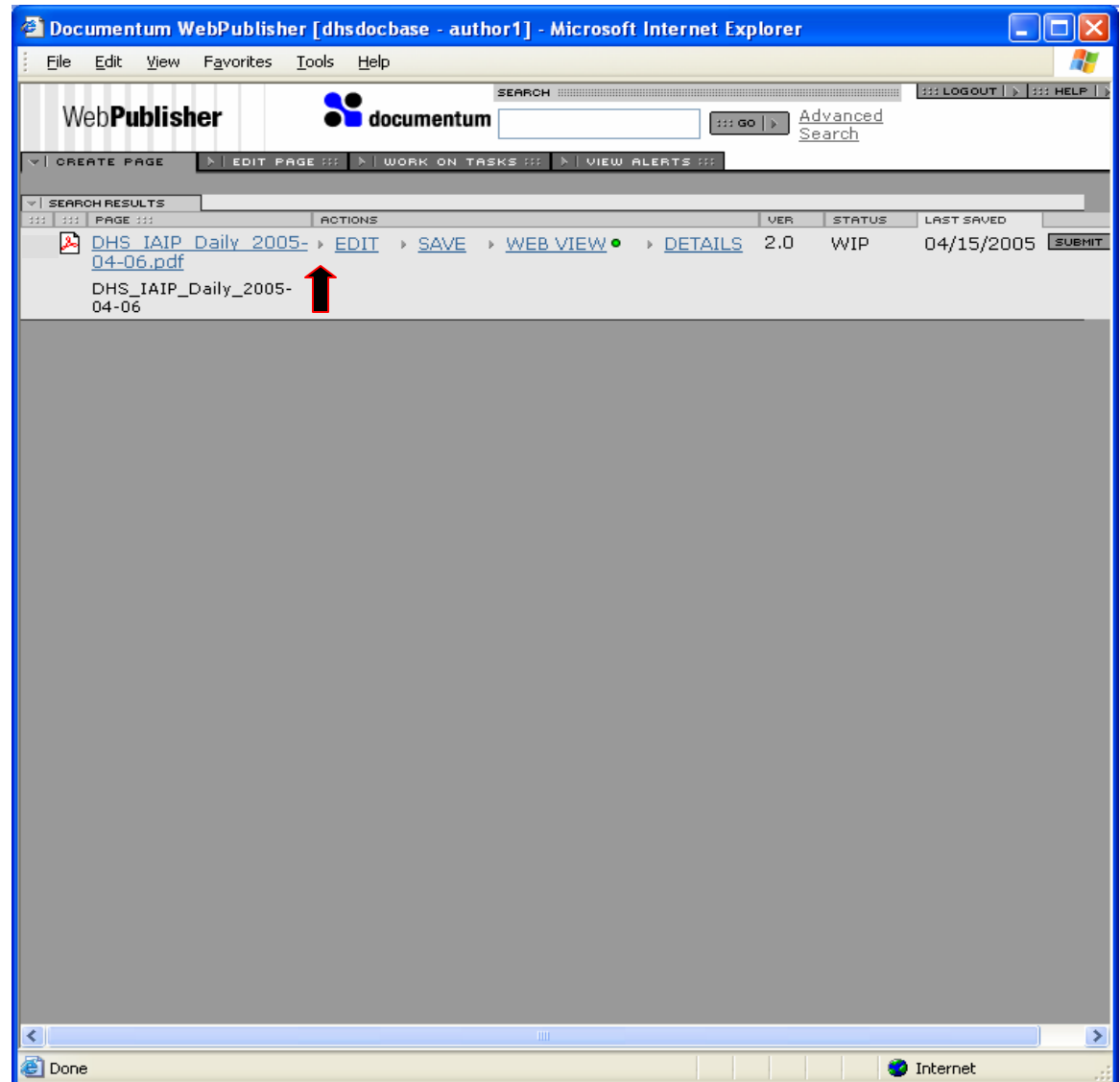

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3. Locate the file you wish to update in the Search Results and click on the "EDIT" button.

4. A Windows dialog box should pop up. The "Choose File to Checkout" phrase is confusing; what you are actually doing here is selecting where you want to save/download the file to your computer. I just let it default to the My Documents folder.

However, you do need to note where you place the file, because you will need to place the new file of the same name into the same folder.
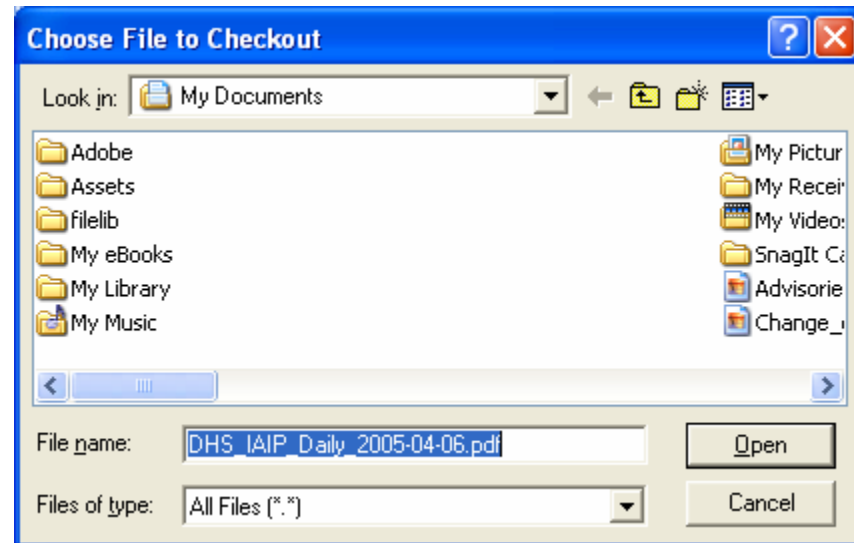
NOTE: You may not get this screen if you have previously updated a file. Documentum will just download the file to the previously used folder on your computer and open the file in its native program. Continue to Step 5.

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5. Documentum will open the file in its native format (shown is an open Adobe file).

(NOTE: If you did not get the "Choose File to Checkout" dialog box shown in the previous slide, You can determine where this file is located on your computer by clicking the "File" menu and clicking on "Save As."

The "Save As" dialog box will open to the folder where the file has been downloaded.
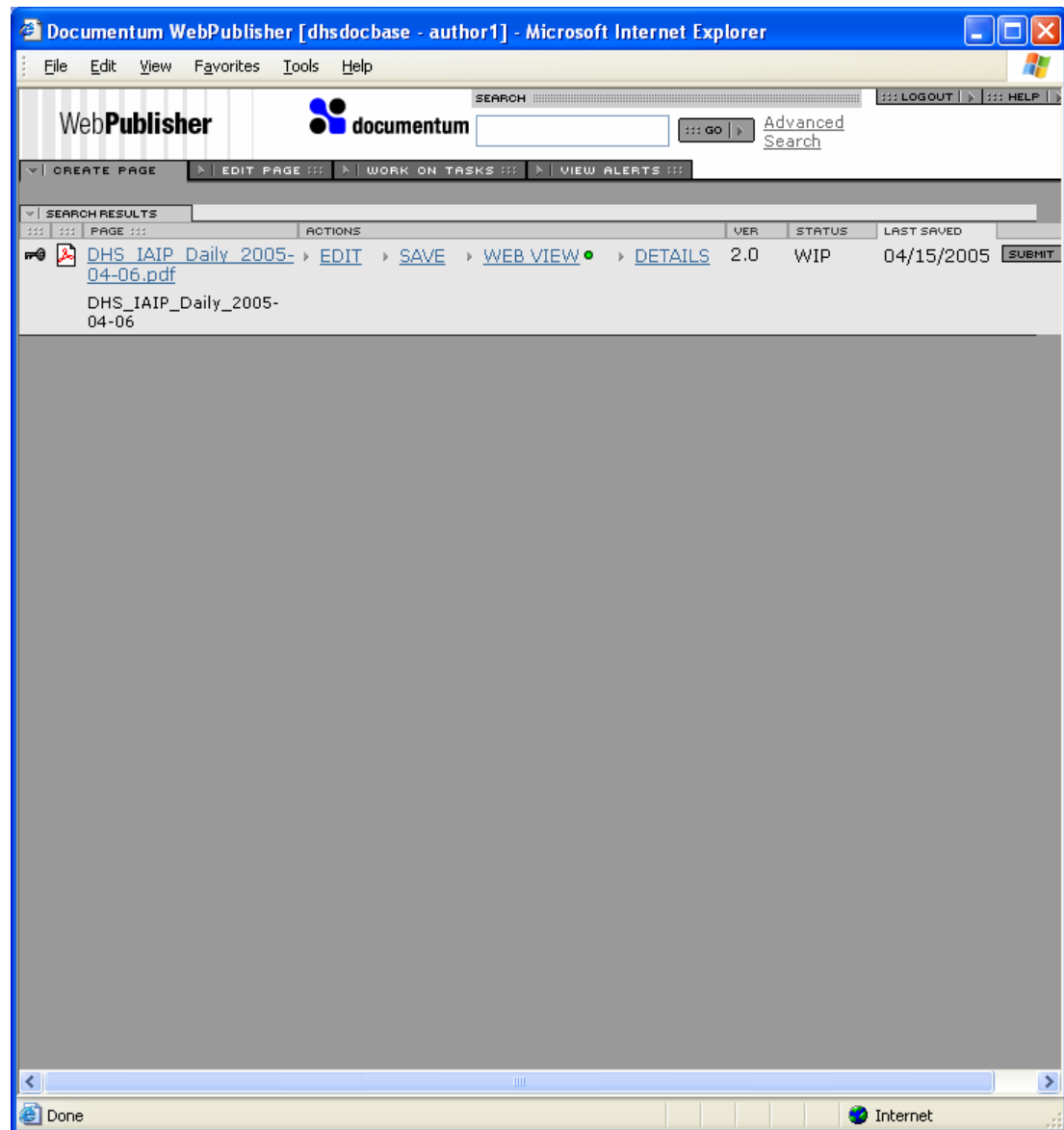Note the location of the file, then click the "Cancel" button.)

Close the application.


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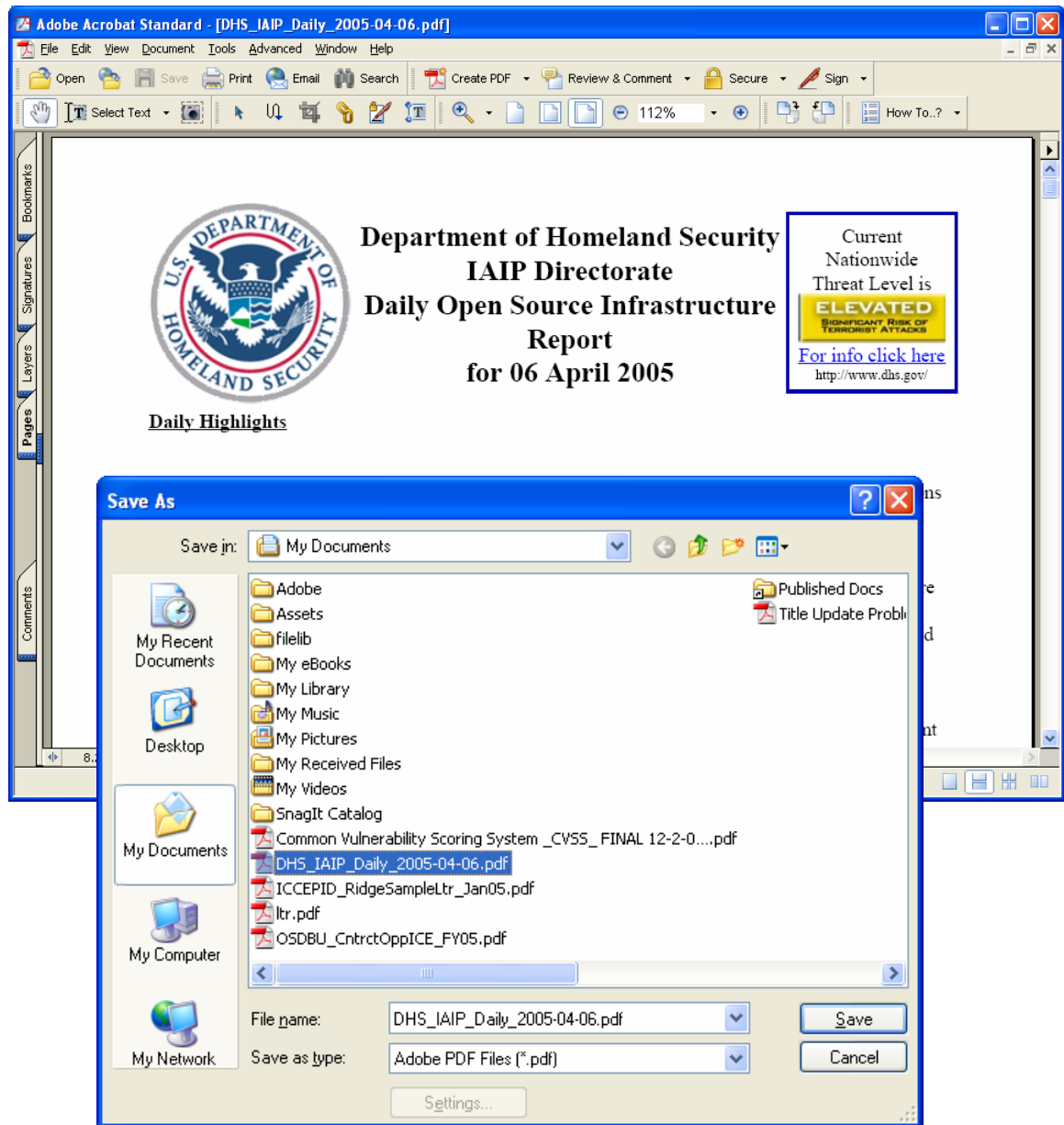
6. The Documentum will return to the Search Results page and you will see a key icon next to the file you are checking out.

Continue to the next step.

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8. At this point you can do one of two things:

a. Locate the downloaded file you want to update in your Windows folder and rename it (e.g., insert OLD into the filename.) Then move the new file into this folder.   Or,

b. Move the new file into the folder where the old file is, and click "Yes" when asked to confirm the file replace.

Either way, you now have the new file ready for Documentum to upload.
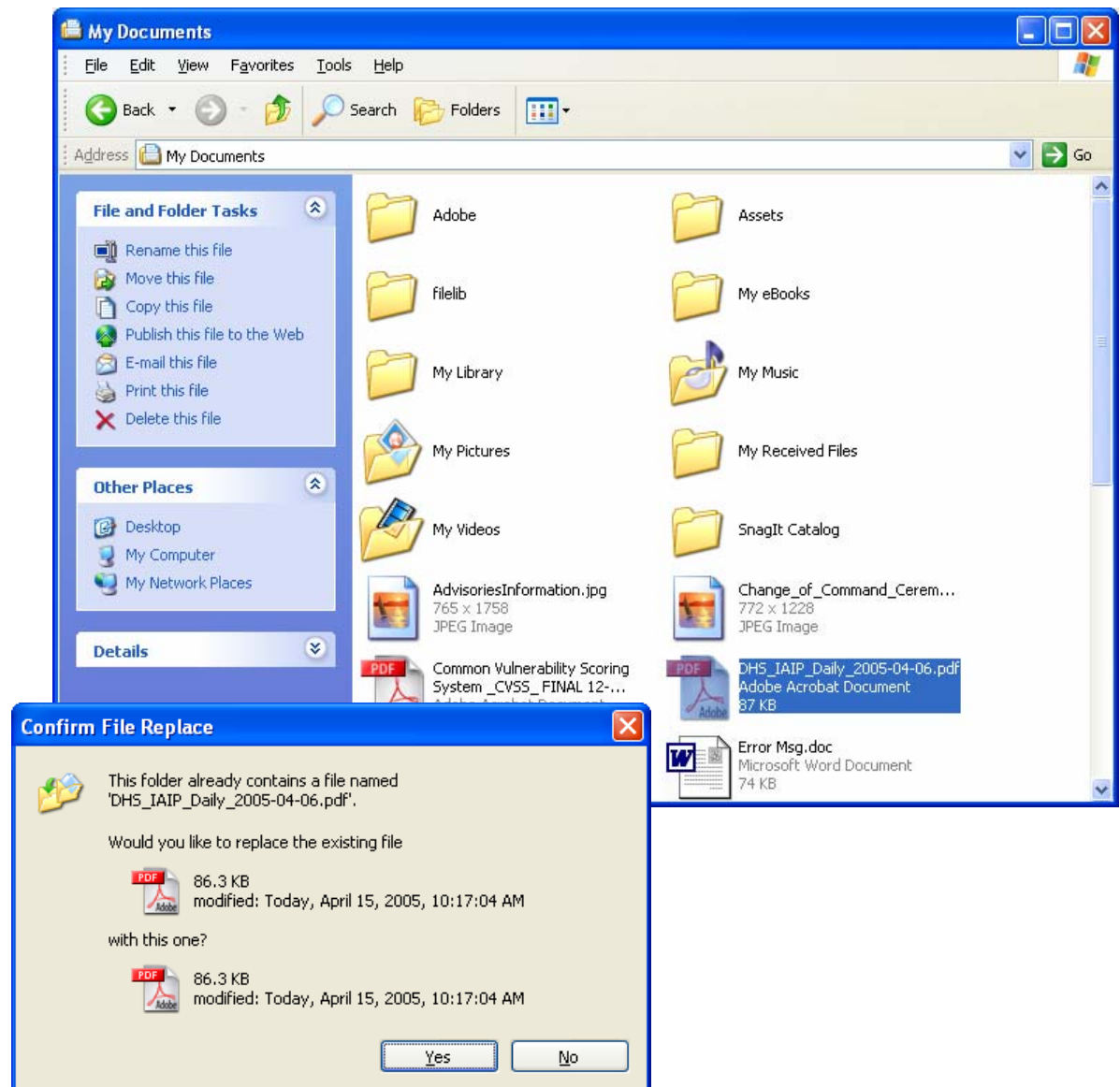
9. Click the "SAVE" button in Documentum.
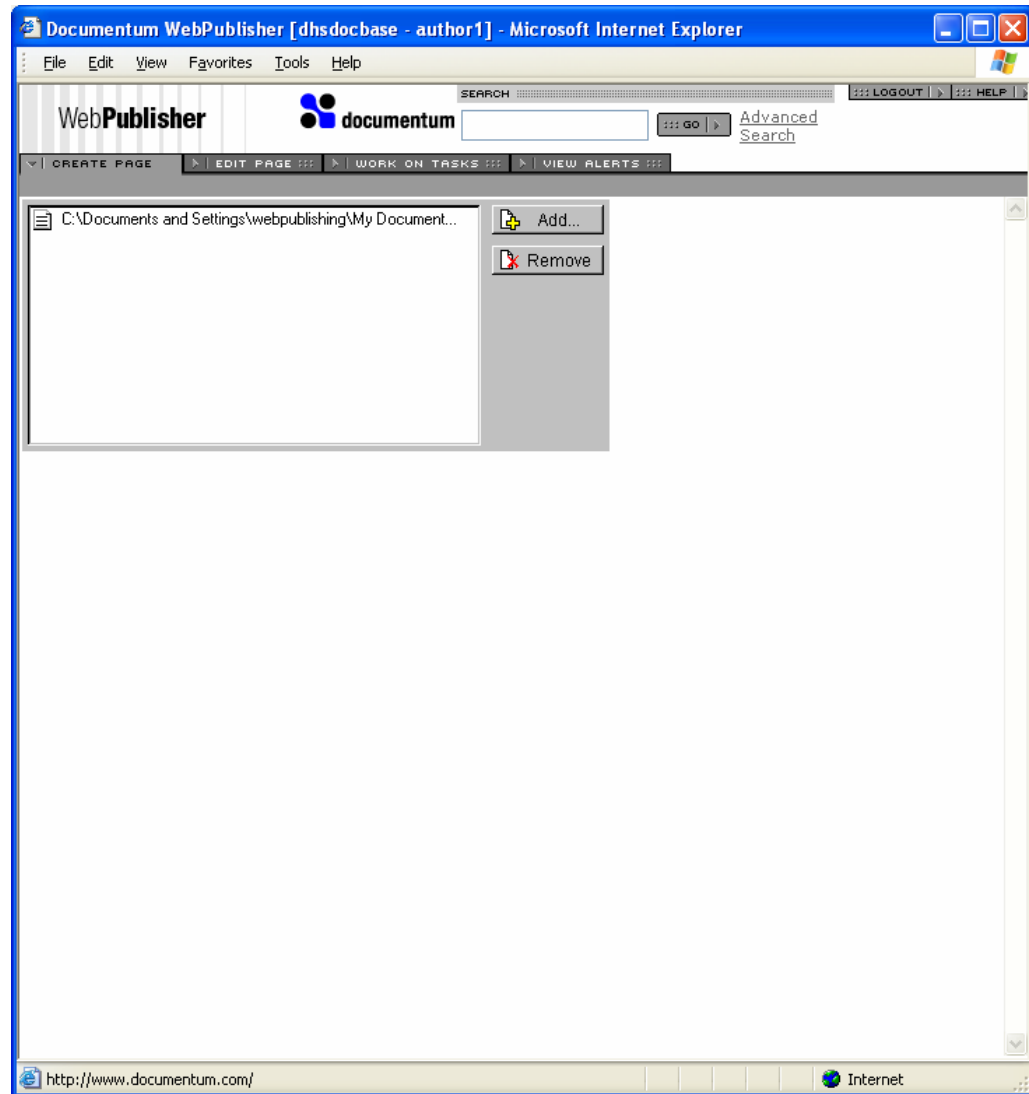
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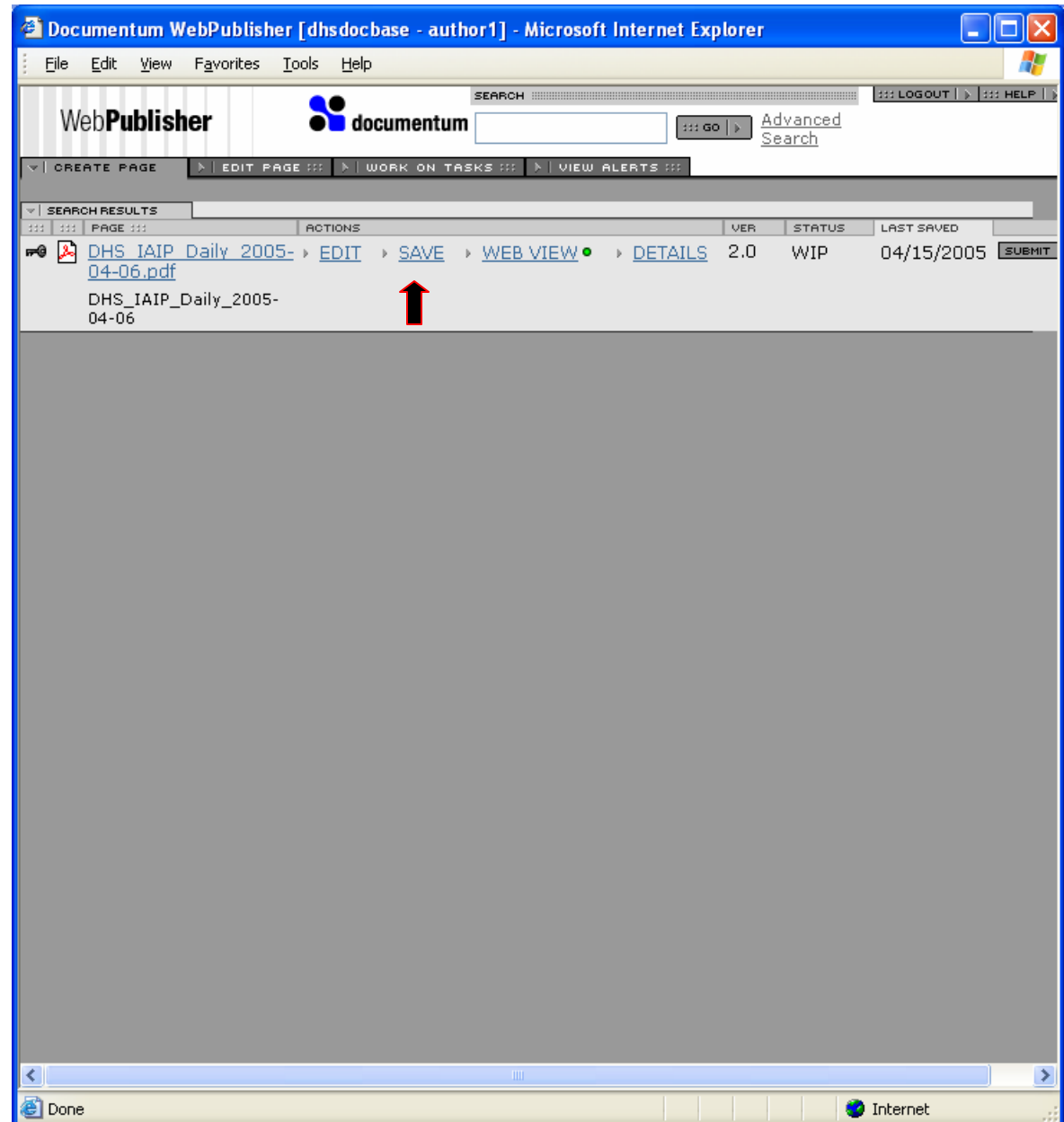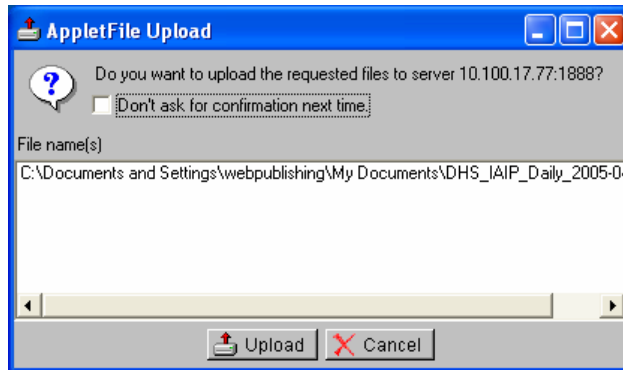
10. You will see the window to the right, and the dialog box above will open.

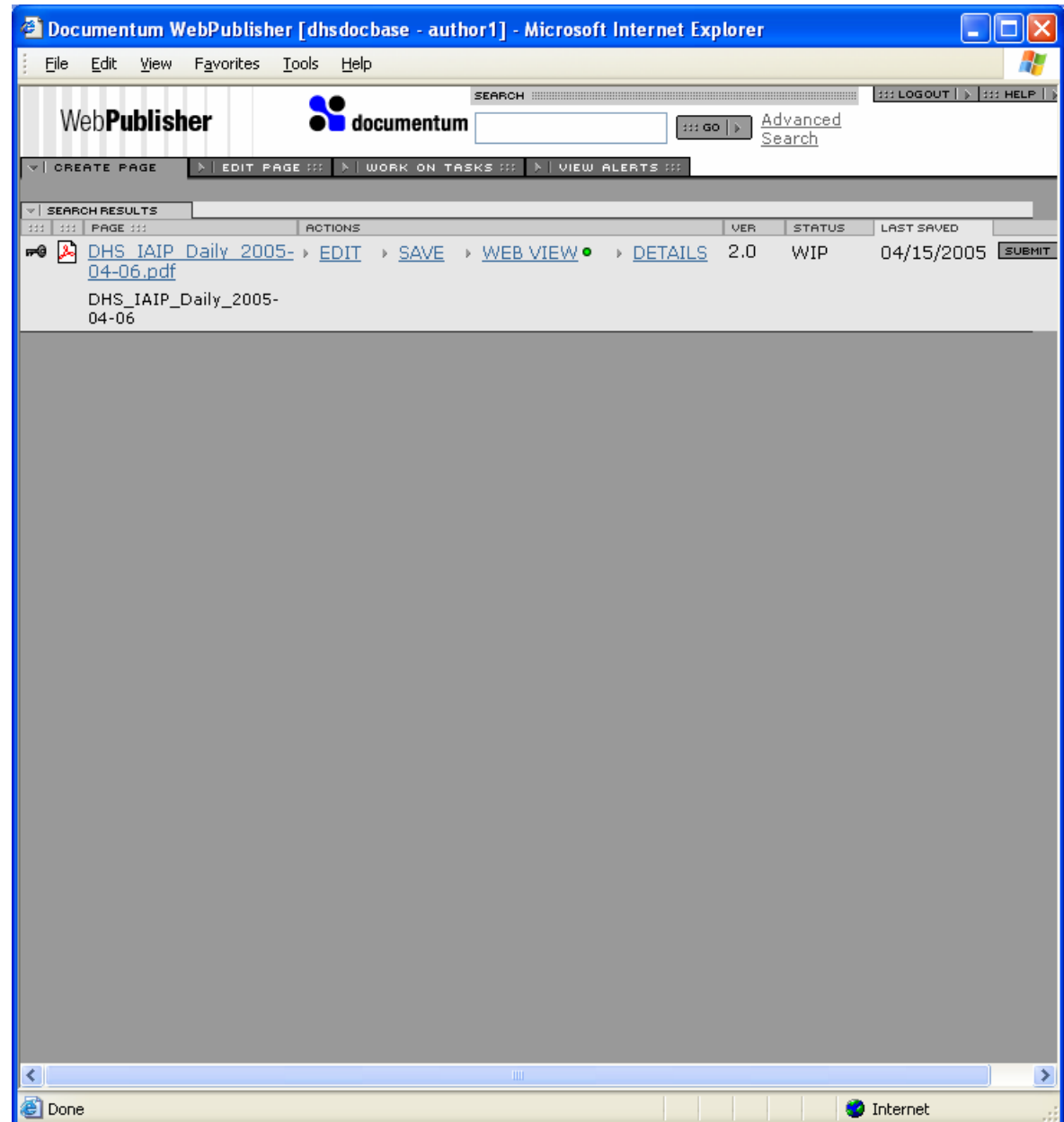Click the "Upload" button on the AppletFile Upload dialog box.

Documentum will then upload the new file.

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11. Once the file has uploaded you will see this screen and then will be returned to the Search Results screen shown on the next slide.
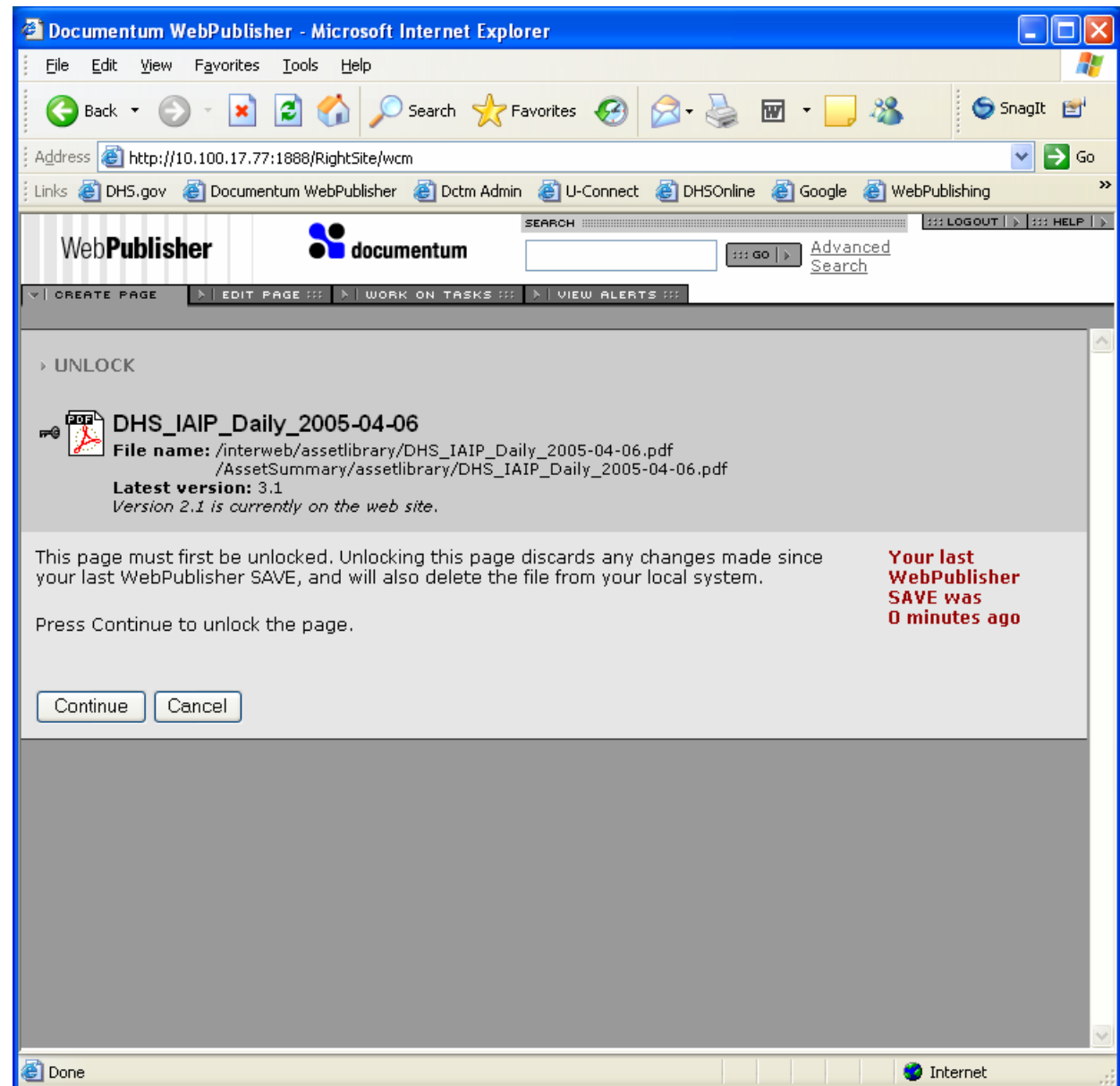

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12. Click the "SUBMIT" button.

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13. This screen appears. While the message states you will lose all changes since your last "SAVE," that's just fine, because you actually saved your file by uploading it to Documentum.

Click the "Continue" button.

14. Complete the form – the only important field here is "Type of workflow," that should be "Asset Upload" you can leave the "Effective date" blank, and type gibberish into the boxes.

This is only true for Asset files, however. Keep in mind that for .xml files you do need to carefully note the "Effective Date" and other fields.

14. You will see the following screen, and then be returned to the Search Results box which looks like nothing happened.
Click on "Advanced Search" and re-search for the file.

Continue to the next step.
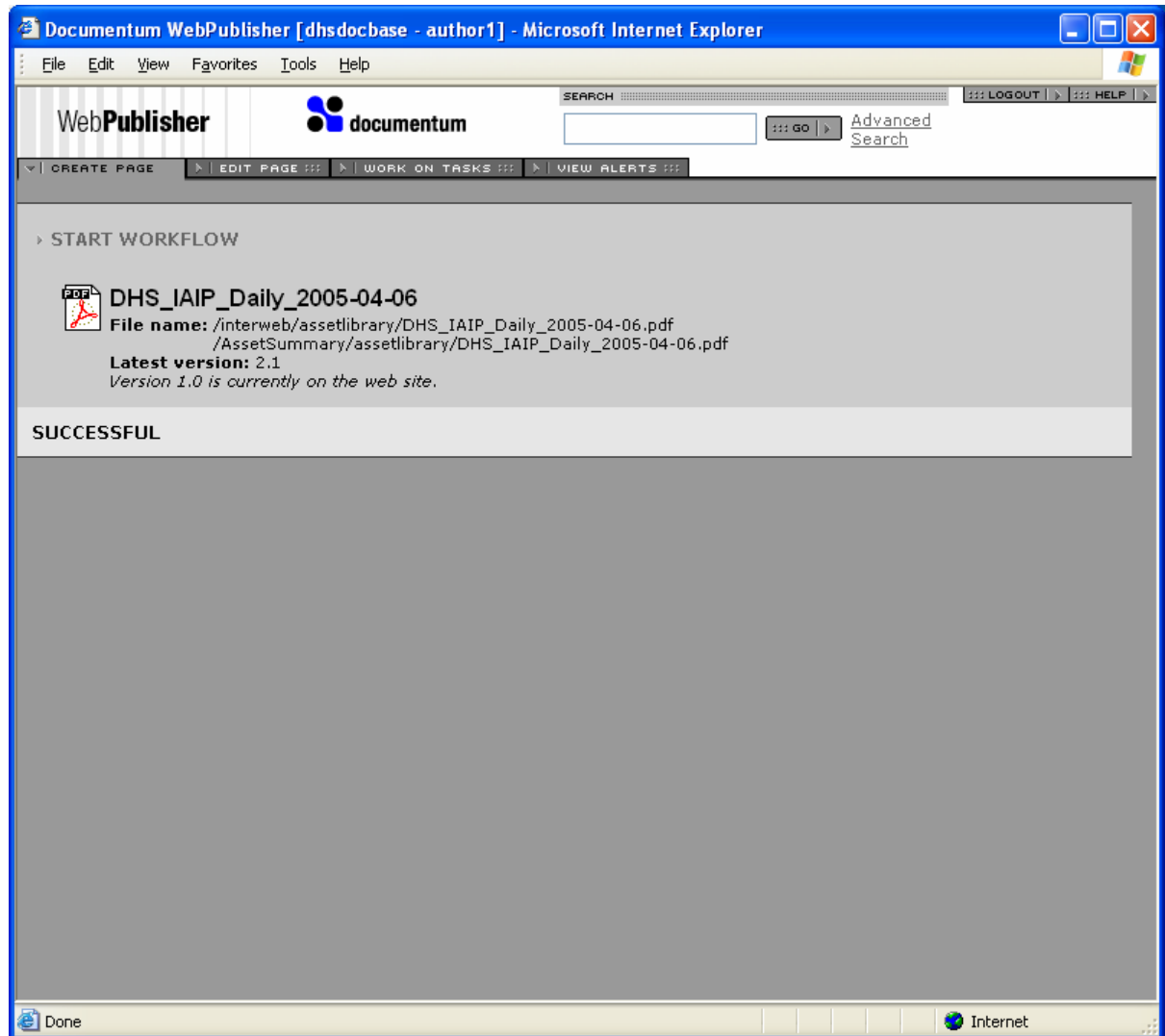
15. In a few minutes you will see the status of the file turn to "Active"

End of Procedure.

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